

Part I -- Request for Task Order (TO) Proposal

RFTOP #85 TITLE: National Children's Study -- Logistical Support

Award of this Task Order is being restricted to Small Businesses

A. POINT OF CONTACT

Contract Specialist: Jan Leahey

E-mail: leaheyj@mail.nih.gov

Phone: 301.435.8867 Fax: 301.402.3676

PROPOSAL and BILLING ADDRESS:

NIH/National Institute of Child Health
and Human Development
Contracts Management Branch
6100 Executive Blvd., Suite 7A07
Bethesda, MD 20892-7510.
Attn: Jan L. Leahey

B. PROPOSED PERIOD OF PERFORMANCE

The Government anticipates awarding a thirty-six (36) month multi-year task order, commencing on the date of award.

C. PRICING METHOD

The Government anticipates awarding a performance-based, cost-plus-award fee task. In performing this task, the Government anticipates the need for the following labor categories: *Project Manager; Project Coordinator; Conference Planner; Editor/Word Processor; Writer; Information Technology Support; Administrative Staff;*

D. PROPOSAL INSTRUCTIONS

1. GENERAL INSTRUCTIONS

The following instructions establish the acceptable minimum requirements for the formatting and content of technical and business proposals, which are being submitted in response to this RFTOP. The Government discourages the submission of unusually elaborate or lengthy proposals.

The proposal shall be prepared and submitted in two volumes: Volume I - Technical Proposal and Volume II - Business Proposal. Each of these volumes shall be separate and complete, in and of themselves, so that evaluation of one may be accomplished independently of evaluation of the other. The Offeror shall submit information relating to “past performance” as a separate section of their Business Proposal. The Government will evaluate proposals in accordance with “Section G Evaluation Factors” page 9 of this document. It is essential that Offerors address all elements of the evaluation criteria.

The RFTOP does not commit the Government to pay any costs for preparation and submission of a proposal. In addition, the Contracting Officer is the only individual who can legally commit the Government to the expenditure of public funds in connection with this proposed acquisition.

The proposal shall be signed by an official authorized to bind the Offeror’s organization to perform if a task order is awarded in response to this RFTOP.

2. VOLUME I - TECHNICAL PROPOSAL

The technical proposal must include information on how the project is to be organized, staffed, and managed. Information should be provided which will demonstrate Offerors’ understanding and management of important events or tasks. Explain how the management and coordination of staffing, which may include consultants and/or subcontractor efforts, will be accomplished.

The technical proposal must include a list of names and proposed duties of the professional personnel, consultants, and key subcontractor employees assigned to the project. Their resumes should be included and contain information about education, background, expertise, and recent experience. The proposed staff hours for each of the above individuals should be allocated against each task or subtask for the project. (This information may be presented in a spreadsheet format).

The technical proposal must discuss the general background, experience, and qualifications of the organization. Additionally, the technical proposal must contain a discussion of current or proposed facilities, electronic systems, and equipment that will be used in the performance of this task.

The technical proposal shall fully describe the technical and administrative aspects of accomplishing each task and shall include the Offeror’s familiarity with similar work.

Offerors’ proposals should include the following:

a) TECHNICAL APPROACH

The technical proposal must discuss the proposed technical approach in sufficient detail to clearly and concisely demonstrate the Offeror's understanding of the project intent, requirements, and deliverables specified in **Attachment A, Statement of Work**. Specifically, the Offeror shall provide:

- 1) Information that demonstrates the Offeror's ability to plan and manage major public meetings and small committee meetings that include both Federal and non-federal participants. The Government is interested in obtaining a streamlined processes to facilitate meeting arrangements. Offerors should discuss their familiarity with electronic systems presently used in meeting planning and tracking.
- 2) Information that demonstrates the Offeror's ability to plan and manage conference calls, including calls that can be accessible to the public. The Government is seeking innovative strategies for scheduling calls in a timely manner with a maximum number of participants.
- 3) Information that demonstrates Offeror's ability to collect, retain, electronically manage, and create reports of personal contact information and expenditures related to Federal and non-federal scientists' participation in multiple meetings.
- 4) Information that demonstrates Offeror's ability to provide writing, editing and word processing support for a large scientific project.
- 5) A sample plan addressing how the Offeror would ensure near-zero incidence of error in managing the collection and input of data into a database.
- 6) Information that demonstrates the Offeror's ability to setup and maintain multiple electronic mail listservs.
- 7) Information that demonstrates the Offeror's ability to plan and carryout Federal Advisory Committee meetings in compliance with applicable guidelines and regulations.
- 8) Information that demonstrates the Offeror's ability to effectively and efficiently manage a large logistics support contract which involves staff planning, cost controls, internal communications, multiple deliverables, and communications with multiple Government officials.
- 9) A transition plan, which outlines plans for facilitating a seamless transition of existing information to new or improved processes.

b) PERSONNEL QUALIFICATIONS/MANAGEMENT PLAN

The proposal shall specify the names and categories of personnel proposed to complete this project, in addition to their proposed duties and the amount of time they will be assigned to tasks set forth in this requirement. Include an organization chart that displays responsibilities

and relationships of all professional project personnel. Resumes of Key Personnel shall be included and shall, at a minimum, include information on education, background, recent experience and expertise, which is relevant to the specific requirements of this RFTOP.

1. Project Manager (key personnel):

Documented evidence of experience in meeting planning, coordinating staff, managing costs, and overseeing information management processes. Evidence for past ability to hire staff for projects in a way that reflects flexibility and responsiveness to changing needs. Evidence of ability to work with industry/academia in a confidential and service-oriented manner.

2. Project Coordinator (key personnel):

The Project Coordinator shall serve as the principal point of contact with the Government and will be responsible for: 1) providing direct supervision and coordination of project staff and consultants; 2) providing, assuring and monitoring the quality control of assignments/tasks; 3) providing staffing continuity; 4) monitoring contract progress; 5) providing deliverables; 6) preparing reports; and 7) maintaining budget control.

3. Conference Planner (key personnel)

Conference Planner shall have demonstrated experience in planning major conferences and a track record of responsive and flexible service provision.

4. Writer, Editor, Word Processor (key personnel)

The writing, editing, and word processing staff shall have demonstrated ability to work with scientific material and unfamiliar terms and content. Experience in preparing summary minutes, lists of action items, fact sheets, briefing books, and orientation manuals, or similar items is essential.

c) CORPORATE EXPERTISE

For the purposes of this task, NICHD is seeking organizations possessing expertise in the following areas:

- 1) planning and providing logistical support for large public meetings, workshops and conferences;
- 2) developing and managing databases;
- 3) scientific and non-scientific writing, editing, word processing;
- 4) managing electronic information systems;
- 5) preparing summary minutes of conferences, workshops, and other kinds of committee meetings.
- 6) constructing reports of expenditures and committee activities
- 7) providing general administrative support to committees

d) FACILITIES AND RESOURCES

Provide documentation of demonstrated availability of adequate facilities, electronic systems, equipment, and resources necessary to conduct this project.

3) VOLUME II – BUSINESS PROPOSAL INSTRUCTIONS

(1) Basic Cost/Price Information

The business proposal must contain sufficient information that allows the Government to perform a basic analysis of the proposed cost or price of the work. The Contractor shall furnish a complete unit and estimated cost breakdown for each year of the task. For each year, state the estimated number of hours, unburdened wage rate for each category, overhead rates, General & Administration (G&A) rate, profit, and any other costs applicable under the accounting system utilized¹.

Cost proposals shall provide labor categories and the estimated number of hours which correspond to each task/subtask as shown in Section C - Statement of Work. Additionally, the cost proposal shall include material costs, subcontracting costs, travel, subscription services, etc, as applicable.

(2) Proposal Cover Sheet

A Sample format for Cost Breakdown is shown below. At a minimum your cost proposal cover sheet should include the following information:

1. Task No. and/or modification number;
2. Name and address of Offeror;
3. Name and telephone number of point of contact;
4. Other records directly pertinent to the information requested or submitted.
8. Date of submission; and
9. Name, title and signature of authorized representative.

¹ The Government intends to award a Cost-Plus Award-Fee contract. Information relating to “Performance Standards and the Quality Surveillance Plan” can be found in the SOW.

Breakdown of Proposed Estimated Cost Plus Fee and Labor Hours

Cost Element		<u>Year 1</u>	<u>Year 2</u>	<u>Year 3</u>
	Total	<u>Hours Amt</u>	<u>Hours Amt</u>	<u>Hours Amt</u>
Direct Labor Cost	\$	\$	\$	\$
Material Cost:	\$	\$	\$	\$
Travel Cost:	\$	\$	\$	\$
Other Specify:	\$	\$	\$	\$
Other Specify:	\$	\$	\$	\$
Total Direct Cost:	\$	\$	\$	\$
Fringe Benefit Cost: (if applicable)	\$	\$	\$	\$
___% of Direct Labor Cost				
Indirect Cost:	\$	\$	\$	\$
___% of Total Direct Cost				
Total Cost:	\$	\$	\$	\$
Base Fee²: (if applicable)	\$	\$	\$	\$
___% of Total Est. Cost.				
Award Fee: (if applicable)	\$	\$	\$	\$
___% of Total Est. Cost.				
Grand Total Estimated Plus Award Fee	\$	\$	\$	\$

² The overall purpose of this performance-based contract is to provide a strong incentive and maximum flexibility for the Contractor to achieve superior performance, allowing the Contractor flexibility in performing the work, and encouraging cooperation with the Government. All evaluations will be performed with this purpose in mind. In preparing their cost proposals, Offerors should propose a “base fee” and “award fee” which shall be negotiated and finalized prior to task award.

- A. The Offeror, at a minimum, must submit a cost proposal fully supported by cost information in sufficient detail to allow the Government to complete a cost realism analysis to establish the reasonableness of proposed costs.
- B. Offerors shall provide a complete unit and total cost breakdown for each year of the proposed task order, which correspond to each task/subtask as shown in **Section C - Statement of Work and using the “Assumptions” provided in Attachment B.**
 - 1. The Offeror shall provide the following detail as part of the cost proposal in addition to any other requirements for cost detail required by this RFTOP.
 - a) For labor estimates, the current hourly or annual rates should be shown and the dates and periods to which rate increases apply should be shown. **The Offeror's policy concerning merit or cost-of-living increases shall be explained in detail.**
 - b) The estimated cost of each task area of performance.
 - c) A copy of the current indirect cost rate agreement.
 - 2. Additionally, the cost proposal shall include the costs for individual elements, such as studies, reports, etc., subcontracting costs, and travel, as applicable:
 - a) **For the purposes of detail.** The Offeror shall indicate whether the estimated costs accounts for any cash discounts, trade discounts, rebates, or allowances, etc. All travel expenditures shall be reimbursed in accordance with Federal Travel Regulations (FTR). In the instance of providing travel estimates, Offerors should propose an average cost of travel and document their methodology for developing that estimate. The Offeror shall identify any pre-existing relationship with a travel agency used to provide the estimates.
 - b) The basis for estimates for material, supplies, equipment, etc., should be explained. **Please be advised that NICHD does not intend to provide funding for the purchasing or leasing of general purpose or IT equipment.**
- (4) The Government anticipates awarding a cost-plus-award fee task; therefore your proposal shall include a recommended **base fee** and **award fee** for completing this effort.

(3) **PAST PERFORMANCE**

The Government will consider the Offeror's prior experience/past performance in managing projects similar to the requirements contained in this RFTOP. The Offeror shall submit the following information as a separate section of their **Business Proposal**:

A minimum of three (3) contracts and/or task/delivery orders completed during the last two (2) years under which the Offeror has performed tasks most similar to the work required in this Statement of Work. A list of on-going projects that are similar in nature to this requirement. The Offeror shall supply verifiable references detailing their performance in similar contract/tasks with either State or Federal Government agencies, non-profit, or educational institutions. For each reference, the Offeror shall provide the following information:

Name of the Contracting Organization;
Contract/Delivery/Task Order Number;
Contract Type;
Total Contract Value;
Contracting Officer's Name, Telephone Number and Facsimile Number;
Project Officer's Name, Telephone Number and Facsimile Number;
Specific nature of services provided and how they are similar to what is described for this RFTOP; and
Explanation/Comments Regarding Problems Encountered and Corrective Actions Taken.

It is the responsibility of the Offeror to ensure that all information supplied as references is current and accurate. The Contracting Officer will not contact the Offerors if the information provided for references is incorrect, incomplete, or no longer current. Proposals which do not contain all of the required past performance information may be adversely affected in the evaluation of their past performance.

Each Offer will be evaluated on its performance under existing and prior contracts/task/delivery orders, which are similar in nature to the requirements of this RFTOP. The Government is not required to contact all references provided by the Offeror. Also, references other than those identified by the Offeror may be contacted by the Government to obtain additional information that will be used in the evaluation of the Offeror's past performance.

E. RESPONSE DUE DATE:

Questions relating to this requirement should be directed to Ms. Leahey's attention, via email, by COB on business day four (4) after RFTOP posting. All resultant questions and answers will be forwarded to all prospective Offerors.

Attn: Jan L. Leahey
EMAIL: LEAHEYJ@NIH.GOV
PHONE: 301.435.8867

An original and three (3) copies of your proposal should be submitted to Ms. Leahey's attention prior to 12:00 p.m., on August 14, 2002.³ Proposals should be submitted to the following address:

³ If day 21 falls on a Saturday or Sunday, proposals are due 12:00p.m., on the following Monday.

NIH/National Institute of Child Health
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6100 Executive Blvd., Suite 7A07
Bethesda, MD 20892-7510.
Attn: Jan L. Leahey

One electronic copy should also be submitted to Ms. Leahey's attention, no later than 12:00 p.m., on the closing date of proposals.

F. TASK DESCRIPTION

The National Institute of Child Health and Human Development (NICHD) is seeking a contractor capable of providing logistical and administrative support to the National Children's Study (NCS). The overall aim of the task is to support the planning phase for the NCS, including supporting large and small meetings, conferences, & workshops; maintaining electronic information and communications; writing, editing, and word processing of scientific and non-scientific material (including meeting minutes, fact sheets, briefing books); writing reports of expenditures and activities; and providing general administrative support to the various entities of the NCS. Offerors are encouraged to visit <http://nationalchildrensstudy.gov> for information about the NCS.

E. STATEMENT OF WORK LOGISTICAL SERVICES IN SUPPORT OF THE NATIONAL CHILDREN'S STUDY

I. Introduction

The Children's Health Act of 2000 authorized the National Institute of Child Health and Human Development (NICHD) and a consortium of Federal agencies "to conduct a national longitudinal study of environmental influences on children's health and development." The study will be of sufficient size and design to identify subtle but important effects of low-level direct exposures, as well as other indirect influences that may impact children's health. Study data and other resources will also benefit future investigations. Scientists at several federal agencies, including the National Institute of Child Health and Human Development (NICHD), the National Institute of Environmental Health Sciences (NIEHS), the Centers for Disease Control and Prevention (CDC) and the U.S. Environmental Protection Agency (EPA) have begun to plan and implement this longitudinal cohort study of the effects of environmental impacts on children and families. This study has been officially named ***The National Children's Study (NCS)***. Offerors are encouraged to visit <http://nationalchildrensstudy.gov> for more information about the NCS project.

II. Background

A unique aspect of the NCS organizational structure is the inclusion of both Federal and non-Federal scientists in planning the study. A committee of assigned scientists from each of the lead Federal Agencies, with oversight by the Director of NICHD, oversees the planning and implementation of the NCS. This Interagency Coordinating Committee (ICC) is comprised of staff from the Department of Health and Human Services (HHS) (NICHD, CDC, NIEHS) and the U.S. Environmental Protection Agency and meets frequently to assure that the planning process

proceeds successfully. A Federal Consortium (FC) consisting of approximately 35 senior federal officials serves as a forum for the NCS. Presently, 20 Working Groups (WGs), which include Federal scientists, non-Federal scientists, and other representatives of key organizations, consider specific scientific aspects of planning the study. The findings of these WGs are considered by the NCS Advisory Committee (NCSAC) before being recommendations are presented to the ICC. Planning activities are monitored and coordinated through a central NCS Program Office within the NICHD.

F.

III. Purpose

The purpose of this requirement is to acquire the services of a contractor capable of managing a complex logistical process for the NCS. In performing this task, the NICHD is seeking a contractor possessing relevant expertise supported by successful past performance in facilitating electronic information tracking systems; managing various-sized meetings, workshops, and conferences; tracking and organizing activities for an extensive roster of committee and WG members; writing and editing scientific and non-scientific material (including meeting summary minutes, fact sheets, briefing books); maintaining records of expenditures and activities in accordance with the Federal Advisory Committee Act; producing high-quality expert level scientific analyses on specific topics; and providing general administrative support to major Federal programs.

IV. Overview

In coordinating the planning phase of the NCS, the NICHD is tasked with providing on-going logistical and administrative support services to enhance communication among the NCS Program Office, various committee and WG members, and the general public. Presently, NICHD is utilizing a variety of methods to communicate among various NCS entities, including the following: posting information for the general public on the NCS website; facilitating communication among numerous committee members via an online eRoom portal; utilizing an electronic system to internally plan and track meetings and organize conference calls; maintaining a database to add, delete, or modify information pertaining to individual WG members; and using listservs for communicating across various WGs and committees⁴. All information pertaining to records of individuals who are tracked by this contract is protected under the authority of the Privacy Act of 1974.

In February 2001, the NICHD began utilizing the services of a commercial contractor who will provide logistical support services to the NCS through this fiscal year. The NICHD is prepared to solicit Offerors capable of providing comprehensive long-term logistical support for the NCS and its various entities. The NICHD anticipates the resultant contract will be awarded for a period of thirty-six months (36) from the effective date of this task.

V. Scope of Work

In accomplishing this work the contractor shall provide support, which includes, but is not limited to the following:

Task 1: Transition and kick-off meeting: Develop and refine plan for transitioning current logistical support to successor contractor. Meet with the NCS Project Officer (PO) to refine and implement the plan.

⁴ See Attachment B for current levels of effort.

Task 2: Study Assembly support: Provide support for a large annual conference (Assembly) in terms of planning, reserving space, providing audio-visual equipment, other logistics, registration, onsite support, reporting, travel (non-federal WG members only; in accordance with Federal Travel Regulations (FTR), per diem payments (non-federal WG members only), honorarium payments (non-federal WG members only), agendas, and meeting materials.

Task 3: General meeting support: For all meetings outside of the major Assembly meetings, provide support to the workshops, community meetings, NCSAC, ICC, and WGs, arrange audio-visual equipment, space, other logistics, onsite support, reporting, travel (non-federal WG members only; per diem payments (non-federal WG members only), honorarium payments (non-federal WG members only), agendas and meeting materials. Provide qualified staffing to participate on-site at all general meetings, workshops, and community meetings. The staffing shall be knowledgeable of all administrative aspects of the NCS, which may include, but not be limited to: information regarding pending meetings; status of travel reimbursements; available to distribute materials to participants; and to collect information from participants.

Task 4: Conference calls. Support conference calls for the NCSAC, ICC, and WG's, which will include, but not be limited to overseeing attendance rosters, scheduling, and summaries.

Task 5: Administrative support. Distribute and collect prescribed data forms from all new WG members, distribute appointment and appreciation letters to WG members and other such communications as need arises.

Task 6: Public Liaison Support: Support the NCS website by editing, formatting, gathering materials and submitting to the NICHD Webmaster for posting. Coordinate responses to public inquiries about the NCS.

Task 7: Information management: Maintain a database and support existing listservs for all entities of the NCS, maintaining them and establishing new listservs as needed. Provide and maintain a streamlined and efficient means of communicating with various NCS entities, which shall include maintaining an electronic system with the capability to organize meetings and conference calls and track activities and deliverables.

Task 8: Reporting: Construct and maintain a reporting system to monitor the activities of the NCS and provide reports to the PO. Keep costs and attendance reports for all meetings and calls and provide on a regular basis. Provide monthly activity reports and financial reports.

Task 9: Contract Closeout: Forward to the PO, all information relating to the NCS, which was developed and maintained under this task.

VI. Specific Requirements

The following requirements outline the current level of support needs of the NCS. They are provided to give guidance about the scope of the support that is required. These requirements will evolve as the planning process for the NCS evolves.

1. Task 1 - Kick-off Meeting

Presently, the NCS has an interim logistics contractor providing services to the NCS. In the event that a different contractor is chosen to perform the tasks listed in this Statement of Work, a transition period will be required. In facilitating this transition, the contractor shall complete the following:

- 1) Within five (5) days of task award, the successor contractor and NCS PO shall meet to refine the plan for transitioning this work.
- 2) The successor contractor shall work with the previous contractor to gather all information, data, and other materials relevant to the tasks presently being provided to the NCS. One or more meetings or conference calls with the Government staff and the previous contractor may be required.
- 3) Work to adapt all existing processes and systems (e.g., database) before attempting to build from scratch. Implement a plan to transition processes and systems seamlessly, including a plan to communicate the procedures, introduce contact people, and orient staff with minimal disruption and confusion to the operations of the NCS and its entities.
- 4) The final plan shall be submitted to the PO for comments within 5 business days of award of this RFTOP and then implemented subsequent to receiving comments from the PO.

2. Task 2 - Study Assembly Support

The Government anticipates the need for conducting an annual meeting (hereafter referred to as the “Assembly”) during the late autumn of 2002, and late summer of 2003 and 2004. The Assembly is considered a critical component of the NCS and provides an opportunity to assemble the NCSAC, ICC, WGs, and FC to discuss the status of progress to date.

a) Planning

A. The contractor will coordinate efforts with the PO, and maintain overall responsibility for planning and managing all aspects of the Assembly as follows:

- 1) Acquire hotel space in the Baltimore/DC Area. The meeting is generally three days in total length and includes approximately 400-500 participants.⁵ Reserve conference space—which requires reserving blocks of sleeping rooms (at Government rates), (approximately 140 rooms) space for a large plenary session, and space for multiple ongoing WGs and other breakout sessions. NICHD generally conducts eighteen (18) parallel 2 _ day workshops during this Assembly.

2) Draft a Federal Register notice announcing the Assembly meeting.

- 3) Draft and distribute electronically save-the-date email messages to all interested stakeholders listed in the Study Assembly list-serve (approximately 1,400 names.) This message shall be sent as soon as place and date for the meeting is confirmed. Draft and mail paper invitations to a designated list of VIP invitees.
- 4) *Send an e-mail invitation to all interested stakeholders. The invitation shall be structured so that there are links to the draft agenda, registration form, and to the NCS Website.*
- 5) *Arrange and pay for travel, honoraria (\$200 per day for WG chairs, \$150 per day for WG core members), sleeping rooms, and per diem, for the non-federal members of 20 Working Groups (approximately 7 members per group).*
- 6) *Arrange for audio-visual (AV) equipment (e.g., flip charts, overhead projectors, power point projectors) for the Study Assembly, WGs, NCSAC and the FC meetings.*

⁵ The NICHD has already reserved conference space to conduct the 2002 Assembly in the DC Metro Area. Therefore, for proposal preparation purposes hotel costs for the 2002 meeting will not be included in this contract.

b) Registration

- 1) **Manage the registration process, which at a minimum includes drafting an announcement for the NCS website and hosting online, fax, and telephone registration via the NCS website to collect registration information from participants (24 hours per day, 7 days per week for online registration). Keep registration open for 4 weeks. Answer questions regarding registration from potential participants. Track registration information in the existing database.**
- 2) *During registration, keep PO informed, on a weekly basis, of the number of attendees and of any problems encountered with the registration.*
- 3) *Follow-up with e-mail reminder messages to only those members of the Study Assembly listserv who have not responded.*
- 4) *If online registration does not begin before 6 weeks prior to the meeting due to extenuating circumstances, contact all non-federal WG members and chairs via phone and email to elicit information for travel arrangements.*

c) On-site Conference Support

- 1) *Arrange coffee breaks for the Study Assembly, NCSAC, FC, and WG meetings, and two (2) working meals for the NCSAC. Food costs shall be minimized.*
- 2) *Provide on-site conference staff support to ensure adequate quality control during setup, on-site registration, and the meetings.*
- 3) *Provide a rapporteur to take concise summary notes during the NCSAC and Study Assembly meetings. The rapporteur should also record attendance at the NCSAC meeting. (The Government will assign WG members to prepare summaries of individual WG meetings.)*
- 4) *The Government anticipates the need for contractor staff to assist in the refinement of some segments of the presentations for the Study Assembly plenary meeting the night before that segment of the meeting.*

A. d) Meeting materials

- 1) *Prepare a list of attendees, including their contact information for distribution at the meeting. Develop the meeting agendas; format and prepare copies of the finalized agenda to be distributed at the meeting.*
- 2) *Contact all the NCSAC Chair and all WG Chairs to request any meeting handouts.*

- 3) *From materials provided by the PO, NCSAC Chair, and WG Chairs, copy and assemble meeting handouts. (Contact by telephone any WG Chairs who did not respond to request for handouts.) Keep the PO apprised of any difficulties in reaching WG Chairs.*
 - 4) *Based on materials provided for distribution to the NCSAC, prepare a briefing book for FedEx distribution ahead of the meeting.*
 - 5) *All final written and electronic materials prepared shall be sent to the PO for approval prior to duplication.*
- e) **Reports**
- 1) *The final meeting report will consist of three major sections: the Study Assembly meeting, the WGs, and the NCSAC.*
 - 2) *For all components, all PowerPoint presentations given and all handouts distributed should be included.*
 - 3) *For all components in final form (including the meeting agenda), put them into web-ready format for posting on the NCS Website, within 5 business days of approval of the final meeting report. Submit to the NICHD Webmaster.*
- a. **Study Assembly Report:**
- i. Prepare a draft summary meeting report of the Study Assembly meeting for approval by PO, within 5 business days after the end of the conference.
 - ii. Format for printing after a final approval from the PO.
 - iii. Print 2 copies of the final report within 5 business days of approval by the PO.
- B. **Working Groups Reports:**
- i. Follow up with the WG member serving as writer for each WG to collect their submission.
 - ii. Prepare lists of attendees to be included with the summary meeting report. Rosters should designate members of the WG versus observers.
 - iii. Compile and edit these submissions into a draft report that has a section for each WG.
 - iv. Submit a draft compilation of this report within 10 business days after the end of the conference to the PO, WG chairs and ICC liaison for the corresponding WG.
 - v. Provide the revised summary meeting report (including all edits) to the PO and relevant ICC Liaison and WG Chairs, within 5 business days of the receipt of the changes.
 - vi. Format for printing after a final approval from the PO.
 - vii. Print 2 copies of the final report within 5 business days of approval by the PO.
- c) **NCSAC Report**
- i. Prepare a draft summary minutes of the NCSAC meeting, for approval by the PO, within 5 business days after the end of the meeting.
 - ii. Provide a revised summary minutes (including all edits), within 2 business days, following review by the PO, NCSAC Executive Secretary, and NCSAC Chair.
 - iii. Format for printing after a final approval from the PO.
 - iv. Print 35 copies of the final, approved summary minutes, within 5 business days of final approval by the PO. Mail one (1) copy to each NCSAC member.
- 4.) *A separate summary of participant evaluations of the meeting and the contractor's general evaluation of the success of the logistical arrangements shall be submitted to the PO within 20 business days of the meeting.*

3) Task 3 - General Meeting Support

The contractor shall provide an online process to facilitate the planning of meetings to support the NCSAC, ICC, and WGs. In general, space for these meetings should be reserved in no-cost government locations (e.g., NIH Natcher Center) whenever possible. At a minimum, the contractor shall support the following activities:⁶

- a) **NCSAC Meetings** -- NICHD anticipates that the NCSAC meetings will generally be two days each in length. Administrative support for the NCSAC is conducted in accordance with the Federal Advisory Committee Act (FACA). Most meetings are open to the public and some segments of these meetings may include the ICC and/or WG chairs. The contractor, at a minimum shall arrange:
 - 1) Audio-visual (AV) equipment (e.g., overhead projectors, power point projectors), table tents, name badges, directional signs, and materials duplication for the meeting.
 - 2) Summary minutes in accordance with the FACA. These summary minutes shall be delivered in draft form to the PO within 5 business days of the completion of each meeting. Upon receiving comments in return, final summary minutes shall be provided to the PO.
 - 3) Overnight accommodations for out-of-town NCSAC members and WG members who are invited to attend. (The contractor is NOT required to provide arrangements for travel, honoraria, and per diem for the NCSAC nor to cover the cost of overnight accommodations for them.)
 - 4) Prior to posting, final printing, or releasing, NCSAC reports shall be certified by the chairman of the NCSAC.
- b) **Working Group meetings:** The WGs meet in person up to twice per year and during the Assembly. The PO must recommend Contracting Officer approval for meetings in excess of the number allotted per year. The contractor, at a minimum, shall:
 - 1) Utilize an existing online Meeting Request Form, which the PO will use to approve proposed meetings, prior to commencement of the meeting planning.
 - 2) Prepare a budget for the meeting, upon receipt of the approved Meeting Request Form., which the PO will review and approve.
 - 3) Provide arrangements for all non-federal travel, overnight accommodations (for out-of-town members), honoraria, and per diem.
 - 4) Approximately, two meetings per year, a writer shall prepare a two (2) to four (4) page-meeting summary that includes a list of action items and decisions. Summaries shall be sent to the particular WG chairs and ICC liaison within 5 business days for comments and a final summary sent electronically to the core WG, the PO, the NCSAC Executive Secretary, the NCSAC Chair, and the webmaster within 3 business days after that.
 - 5) Arrange for audio-visual (AV) equipment (e.g., overhead projectors, power point projectors), table tents, name badges, directional signs, and materials duplication for the meeting.

⁶ See Attachment B for Assumptions

- 6) Duplicate materials for use at the meeting as provided by the ICC liaison or WG chairs. Preparing meeting folders for participants if needed. Table tents and name badges are not needed.

c) **ICC Support**

- 1) **Approximately, two meetings per year, a writer shall prepare a two (2) to four (4) page meeting summary during the monthly one-day meeting. The summary shall include a list of action items.**
- 2) **The summaries shall be sent to the three ICC co-chairs within 5 business days for comments and a final summary sent electronically to the ICC and to the PO within 3 business days after completing approved revisions.**

d) **Workshops and Community Meetings**

The Government anticipates the need to conduct multiple workshops during the performance of this task. Some may be scientific workshops related to a specific topics, others may be meetings with community organizations or other non-governmental organizations, possibly at sites remote to the Washington, DC area. In conducting these activities the contractor shall:

- 1) **Pay a specified honorarium (approximately \$200) for invited experts. The Government anticipates the need for approximately 150 experts per year.**
- 2) **Arrange suitable meeting space in no-cost facilities (e.g., NIH campus, CDC facilities) before seeking space in paid hotel facilities.**
- 3) **Arrange lodging, travel, per diem and honoraria for invited non-Federal experts following the guidelines described in previous sections.**
- 4) Draft invitations and deliver them to a designated list of participants. Invitations will be created in a combination of electronic and paper formats, depending on the circumstances. Draft appropriate announcements for the workshops or community meetings and post in pre-designated sources.
- 5) Arrange overnight accommodations for out-of-town participants in a hotel offering Government rates near the meeting facility.
- 6) The workshop or meeting summaries shall be sent to the PO within 5 business days for comments and a final summary sent electronically to the PO and the Webmaster within 3 business days after that. Scientific reports shall be sent to the PO within 20 business days for comments and a final report sent electronically to the PO within 10 business days after that.
- 7) Duplicate materials for use at the meeting as provided by the PO. Prepare meeting folders for participants. Table tents and name badges shall be provided for each participant.

4. **Task 4 - Conference Calls**

The contractor shall support all conference calls for the NCSAC, ICC, and WGs. At a minimum, the contractor shall:

- a) **Record attendance of all present.**
- b) **Poll members to determine dates and times to schedule. Scheduling shall be conducted in a way that maximizes the number of participants but does not delay scheduling until the last minute.**
- c) **When required on occasion, draft a Federal Register notice, for PO's approval, which announces particular conference calls.**

- d) **Provide a writer to prepare a conference call summary of approximately 2 pages, unless the call is of an extended length (more than 3 hours) whereby the summary shall be slightly longer. Summaries shall include a list of action items. Summaries shall be sent to the appropriate staffing (e.g., WG chairs and liaison, NCSAC executive secretary and chair, or ICC co-chairs) within 3 business days for comments and a final summary sent electronically to the appropriate staffing and PO within 3 business days.**
- e) **Provide options to conduct occasional calls in a way accessible to the public. This option must allow and limit access as necessary and require individuals to identify themselves upon entry to the call.**

5. Task 5 - Administrative Support

The contractor shall provide qualified staffing to support various WGs and committees. Responsibilities include, but are not limited to the following:

- a) **Working Group Member Forms**
 - 1) **Forward an electronic Working Group Member Form (to be provided by the Government) to all new WG members.**
 - 2) **Follow-up within 10 business days with individuals who do not submit or who submit an incomplete form.**
 - 3) **Submit electronic copies of all submitted forms to the PO in weekly batches on Wednesdays.**
 - 4) **Maintain a master file of all forms received.**
- b) **Appointment and Appreciation letters**
 - 1) **Within 30 days of a person's selection as a WG member, mail one-page letter of appointment (provided by the PO) using NCS letterhead, to all new core Working Group members via U.S. Postal Service.**
 - 2) **Utilize the database to retrieve mailing addresses and track the letter .**
 - 3) **A letter of appreciation shall be sent to all WG members at a later date in the same manner as above**

6. Task 6 – Public Liaison Support

The contractor shall provided limited content support for the NCS Website and other media, which requires that the contractor:

- a) **NCS Website**
 - 1) **Edit and format materials for placement on the Study website or for other communications purposes.**
 - 2) **Gather materials (e.g., PowerPoint slides, announcements) from the Program Office to be edited and formatted for final approval by the PO.**
 - 3) **Submit materials to the NICHD Webmaster with an indication of where to place the material, if approved by the PO for use on the website. Submissions shall occur weekly on Wednesdays via electronic submission to the Webmaster with a carbon copy to the PO.**
- b) **Inquiries**

- 1) Respond to frequent questions from the public or others involved in the NCS via email or telephone using standard replies provided by the PO or forward for follow-up to the appropriate person.

7. Task 7- Information Management

a) Database

- 1) **Adapt and maintain an existing database of members of all NCS entities. This database includes contact information, membership on which entity, past expenditures associated with each individual (e.g., honoraria paid, travel), and registration and attendance information for meetings and calls.**
- 2) **Send monthly (on the first of the month) electronic copies of WG core and at-large rosters to the respective ICC liaison and WG chairs for their review.**

b) Information management process

- 1) **The contractor shall recommend an effective process for maintaining and updating the database and listservs, which allows various groups to have access to current and relevant information.**
- 2) **The contractor shall input new information into the database within 5 business days and the email address into the appropriate listserv(s) within 3 business days. (Simultaneously, the NIH Center for Information Technology (CIT) will provide new core WG members with portal accounts.). Each Thursday, updated database information shall be made available to CIT for download via FTP or another mutually agreed upon mechanism. WG rosters shall be linked to the public NCS website so that that information on the website updates as part of the weekly website content update.**

c) Listservs

Presently, the NCS has an existing set of listservs to facilitate communication among the various NCS entities. The contractor, at a minimum, shall support the following, OR as an alternative, recommend a system to accomplish the same goals of electronic communication:

- 1) **Create or modify existing Listservs for each WG, the WG chairs, the ICC, NCSAC, the Study Assembly, the FC, including listservs for each WG's at-large members as well. All listservs shall preserve access from co-owners in the Program Office.**
- 2) **Establish and maintain additional listservs as requested, such as advocacy organizations and non-federal partners.**
- 3) Provide occasional technical support to listserv users via email or phone.

d) Tracking System

- 1) The contractor shall establish, document, and maintain an electronic tracking system to monitor the status of NCS activities. This system shall be capable of providing various reports to the Program Office. When possible, the contractor shall import existing status data into the system and provide for its maintenance.
- 2) Data contained in the tracking system shall include, but not be limited to the committee or WG roster and status data about various activities.

3) Although maintenance of the tracking system shall be the responsibility of the contractor, the contractor shall provide maintenance instructions and forms to the PO, or his/her designee, so that Program Office staff may access data and make online corrections.

8. Task 8 - Reporting

The NCS is mandated to provide extensive information relating to committee and WG members in accordance with the FACA. Therefore, the contractor shall provide the following in accordance with **Section VII. Deliverables:**

a) Working Group Attendance Reports

The contractor shall collect relevant information on location, name of the WG, dates, room fee, teleconferencing fee, names of those present, mailing costs, printing costs, shredding costs, transcribing costs, speaker costs, supplies costs, cancellation fees, other fees; and total per diem costs, total travel costs, total honoraria costs by WG member; for all future WG meetings and conference calls. Clarify whether each person was a core WG member, at-large WG member, or other at the time of the meeting or call. Provide all new lists (electronically) to the PO on a weekly basis on Fridays.

b) Monthly Activity Report

- 1) *The contractor shall provide a narrative summary of task activities, highlighting any significant events, trends, or problems that occurred, and recommendations for improving performance. This report shall be submitted on the 15th of each month.*
- 2) *All activities for the month shall be listed in bullet format on a report displaying the following items and noting the particular group: WGs (by Working Group), Study Assembly, Reimbursement status, ICC, Website, and NCSAC.*

c) Monthly Financial Report

- 1) *The contractor shall provide information about NCSAC activities for the month including a listing of meetings and conference calls, a Microsoft Excel document listing of all NCSAC members who attended. (WG members who are invited attendees at NCSAC meetings shall have their costs listed under the WG Attendance Reports, not as part of the NCSAC reports.). This report shall be submitted on the 15th of each month.*
- 2) *The contractor shall provide billing information for activities of the NCSAC. This shall include the cost associated with all NCSAC conference calls, meetings (including those associated with the Assembly), and other support work that can be identified as in support of the NCSAC. Any costs that can be attributed to specific NCSAC members shall be listed by individual and totaled for each individual.*
- 3) *All costs for the month shall be tallied in a Microsoft Excel financial summary report displaying the following items: WG costs (by WG) Study Assembly costs, ICC costs, Federal Consortium costs, NCSAC costs, NCSAC plus WG costs, and other cost categories as needed.*

9. Task 9 - Contract Closeout

- a) All information assembled, produced, or tracked during performance of this task remains the property of the Government.
- b) Within (thirty) 30 days of task expiration, the Contractor shall transfer, to the PO, all materials relating to the NCS, which may include both electronic files and hard copy.

- c) Upon completion of the task, the Contractor shall individually box and label, all NICHHD materials for transfer as directed by the PO and CO.

VII. DELIVERABLES

A. SCHEDULE OF DELIVERABLES

<u>Item</u>	<u># of Copies</u>	<u>Due Date</u>
1. Kick-off Meeting		within 5 days of award
2. Final Transition Plan*	1 copy (electronic)	within 5 days after meeting
3. WG rosters.	3 copies per WG (electronic),	1 st of each month
4. WG member form,	1 copy (electronic)	Every Wednesday
5. Website content updates	2 copies (electronic)	Every Wednesday
6. Database updates,	1 (electronic)	Every Thursday
7. WG attendance reports	1 copy (electronic)	every Friday
8. Meeting evaluation report	3 copies	20 business days after Assembly
9. Financial report*	1 copy (electronic)	15 th of each month
10. Monthly Activity	1 copy (electronic)	15 th of each month
11. Annual Report*	1 copy (electronic)	End of each contract year

Meeting Reports	# of copies	Due Date
1. Assembly Meeting reports:		
a) WG report	2 copies	5 business days after of final approval of draft
b) NCSAC report	35 copies	5 business days after approval of draft
c) Assembly report	2 copies	5 business days after approval of draft
2. ICC summary minutes (from in-person meetings)	2 copies	3 business days after final approval of draft
3. Workshop/community meeting summaries	2 copies (electronic)	3 business days after approval of draft
4. NCSAC meeting summary minutes	35 copies	5 business days after approval of draft
5. WG summary minutes (from in-person meetings)	5 copies (electronic)	3 business days after final approval of draft
6. Conference call summaries	Varies	3 business days after final approval of draft
7. CSAC Briefing Books		13 business days prior to each meeting

All deliverables shall be submitted to:

NICHD/National Children's Study
6100 Executive Blvd., Suite _____
Bethesda, MD 20892-7510

*NICHD/Contracts Management Branch
6100 Executive Blvd., Suite 7A07
Bethesda, MD 20892-7510

Attn: NCS Project Officer

Attn: Jan Leahey

|

B. Invoice Submission

- 1) The Contractor shall submit an original and two (2) copies of its invoice to:

Ms. Jan Leahey,
Contract Specialist, NICHD,
Contracts Management Branch,
6100 Executive Blvd., Suite 7A07
Bethesda, MD 20892-7510

- 2) The Contractor agrees to include the following minimum information on its invoice:

- Contractor's Name and Address;
- Task Order Number;
- Invoice Number;
- Description of Services (including the hours, labor category and specific task);
- Invoice Period;
- Payment terms; and
- taxpayer Identification Number (TIN).

VIII. DELIVERY ORDER ADMINISTRATION DATA

a) AUTHORITIES OF GOVERNMENT PERSONNEL

Notwithstanding the Contractor's responsibility for total management during the performance of this delivery order, the administration of the delivery order will require maximum coordination between the Government and the Contractor. The following individuals will be the Government's points of contact during the performance of this delivery order:

1. Contracting Officer

All administration shall be performed by Ms. Jan Leahey, Contract Specialist, NICHD, Contracts Management Branch, 6100 Executive Blvd., Suite 7A07, Bethesda, MD 20892-7510. All communications pertaining to contractual and/or administrative matters under this task should be addressed to Ms. Jan Leahey at the aforementioned address.

2. Project Officer

The Project Officer (PO) shall be designated on the authority of the Contracting Officer at the time of delivery order award to monitor all technical aspects of the contract. The type of actions within the purview of the Project Officer's authority are to assure that the Contractor performs the technical requirements of the task order and to notify both the Contractor and the Contracting Officer of any deficiencies observed. A letter of designation shall be issued to both the PO and the Contractor at the time of task order award setting forth in full the responsibilities and limitations of the PO.

b) **TECHNICAL MONITORING: Performance of the work under this delivery order shall be subject to the technical monitoring of the PO. The term "Technical Monitoring" is defined to include, without limitation, the following:**

1. Technical directions to the Contractor that redirect the contract effort, shift work emphasis between work areas or assignments, require pursuit of certain lines of inquiry, fill in details or otherwise serve to accomplish contractual scope of work.
2. Providing information to the Contractor for assistance in the interpretation of drawings, specifications or technical portions of the work description.
3. Review and, where required by the task order, approval of technical reports, drawings, specifications and technical information to be delivered by the Contractor to the Government under the task order.

Technical direction must be within the general scope of the work stated in the task order. The Project Officer does not have the authority to, and may not issue, any technical direction which: (i) constitutes an assignment of additional work outside the general scope of the order; (ii) constitutes a change as defined in the task order clause entitled "Changes"; (iii) in any manner causes an increase in the total task order cost or the time

required for delivery order performance; or (iv) changes any of the expressed terms, conditions, or specifications of the task order.

All technical directions shall be issued in writing by the Project Officer or shall be confirmed by him/her in writing within five (5) working days after issuance.

The Contractor shall proceed promptly with the performance of technical directions duly issued by the Project Officer in the manner prescribed within his authority under this provision.

If, in the opinion of the Contractor, any instruction or direction issued by the PO is within one of the categories as defined in (i) through (iv) above, the Contractor shall not proceed, but shall notify the Contracting Officer in writing within five (5) working days after the receipt of any such instruction or direction and shall request the Contracting Officer to modify the delivery order accordingly. Upon receiving such notification from the Contractor, the Contracting Officer shall issue an appropriate delivery order modification or advise the Contractor in writing that, in his opinion, the technical direction is within the scope of this article and does not constitute a change under the Changes Clause of the task order. The Contractor shall thereupon proceed immediately with the direction given. A failure of the parties to agree upon the nature of the instruction or direction or upon the delivery order action to be taken with respect thereto shall be subject to the provisions of the delivery order clause entitled "Disputes."

c) KEY PERSONNEL

Key Personnel are those employees considered essential to the work being performed under this delivery order. Prior to removing, replacing, or diverting the specified individual, the Contractor shall notify the Contracting Officer reasonably in advance and shall submit justification (including proposed substitutions) in sufficient detail to permit evaluation of the impact on the task order. No diversion shall be made by the Contractor without the written consent of the Contracting Officer, provided that the Contracting Officer may ratify in writing changes made due to events beyond the control of the Contractor and such ratification shall constitute the consent of the Contracting Officer required by this clause.

Examples of events beyond the control of the Contractor are (1) prolonged sickness, (2) termination of employment, and (3) death. Key personnel, with the consent of the Contracting Officer, may be amended from time to time during the course of the delivery order to either add or delete personnel, as appropriate.

(TO BE ADDED UPON ISSUANCE OF TASK ORDER)

Name

Title

Project Director
Project Manager

Conference Planner
Writer

IX. ESTIMATED COST, FIXED FEE AND AWARD FEE

- a. The total estimated cost (exclusive of any fees) of this contract is \$_____.
- b. The fixed-fee for this contract is \$_____. Payment of fixed-fee shall be made in equal monthly installments.
- c. The maximum amount of Award Fee that may be earned under the contract is \$_____. Award fee earned shall be based upon an evaluation and determination by the Government as to the Contractor's level of performance in accordance with the following procedures:
- 1) The Contractor's performance shall be evaluated on a semi-annual basis, (every six months) during the period of the contract. The award fee evaluation periods will be finalized prior to task award. The maximum amounts for each period are listed in **"X. PERFORMANCE STANDARDS AND QUALITY SURVEILLANCE PLANS."**
 - 2) The criteria set forth in the Quality Assurance Surveillance Plan, included in the Statement of Work, shall be used to evaluate the Contractor's performance.
 - 3) The Contractor further agrees that the Contracting Officer, taking into consideration an analysis and evaluation of the Contractor's performance made by the Award Fee Evaluation Group described in "AWARD FEE", will make the final determination regarding the amount of Award Fee earned. This determination shall not be subject to the terms of the "Disputes" clause of this contract. The Contractor shall be advised in writing of the decision setting forth reasons why the Award Fee was earned, or why it was not earned, in order that the Contractor may improve its performance during the next six (6) months, if the latter is applicable.
 - (4) Notwithstanding any other provisions of this contract, the fee for performing this contract shall not exceed the statutory limitations prescribed in the first sentence of Section 304(b) of the Federal Property and Administrative Services Act (41 U.S.C. 254(b)) for services other than research, development or experimental work.
- d. The Government's maximum obligation, represented by the sum of the estimated cost, fixed-fee, and award fee is \$_____.
- e. Total funds currently available for payment and allotted to this contract are \$_____, of which \$_____ represents the estimated costs, \$_____ the fixed-fee and \$_____ the possible award fee. For further provisions on funding,

see the LIMITATION OF FUNDS clause incorporated herein.

- f. The amounts negotiated (and anticipated incremental funding schedule) for this contract are as follows:

Period of Performance	Estimated Cost	Fixed Fee	Award Fee Possible	Total Est. Cost Plus Fees

- g. It is estimated that the amount currently allotted will cover performance of the contract through _____.

X. PERFORMANCE STANDARDS AND QUALITY SURVEILLANCE PLANS

The information contained in the following chart, Column 1 “Required Services” and Column 5 “Award Fee” are non-negotiable; however, the Government will consider options and recommendations proposed by Offerors, for Columns 2-4, which will be negotiated and finalized prior to Task award. The award fee for each six (6) month period will be evaluated on the basis of costs incurred for that period.

Required Services	Performance Standards	Quality Assurance Surveillance Plan	Standard to be Met/allowable Deviation	Award Fee
Reimbursement of consultants or participants	Timely and accurate reimbursement of participant’s allowable expenses per SOW	PO monitoring; reports and external feedback	The contractor shall reimburse at least 85% of reimbursable event participants within 30 days and 97% within 60 days	10% \$: <u>TBD</u>
Deliverables	Complies with task order SOW and deliverables	CO & PO monitoring	95% of reports and other deliverables are error free and delivered on or before time required in SOW	20% \$: <u>TBD</u>
Overall Contract Management	Contractor maintains high level of quality assurance; maintains qualified staffing; resolves problems quickly	CO & PO monitoring; reviewing monthly reports and internal customer feedback	No more than 2 valid complaints in 6 month period; minimal CO intervention required	30% \$: <u>TBD</u>
Overall Cost Containment	Contractor maintains adequate cost control for	Compare final actual costs against estimated	Contractor stays w/in budget 100%	10% \$: <u>TBD</u>

	projects, specifically for meetings and Assembly	cost	Saves 5% or more	5% \$: <u>TBD</u>
Overall Quality of Meetings and Assembly	Contractor maintains quality staffing and appropriate staffing levels for meetings; high level of QA and customer service	Random survey of participants. Contractor presents tally sheet and backup of surveys	Superior – 95-100% Excellent – 90-94.9% Good -- 85-89.9% Poor -- 84.9%	25% \$: <u>TBD</u>

**XI. AWARD FEE – Evaluation Guidelines and Procedures for a
Performance-based Cost
Plus Award Fee (PBCPAF) Contract**

a) Purpose and Results Desired

1. The purpose of this document is to establish a proposed procedure for evaluating a Contractor's performance to provide logistical and administrative support to the National Children's Study. The evaluation will be conducted on a semi-annual basis, (i.e., twice a year) and the Contractor's Award Fee will be based on the quality of services provided, inclusive of deliverables, using a numerical scale from 0 to 100.
2. The Agency's decision to pay or not to pay Award Fee in no way alters the Contractor's responsibilities to perform any functions or produce any deliverables required by the task awarded as a result of this Request for Task Order Proposal (RFTOP). The Agency's decision to pay or not to pay an Award Fee in no way alters the Department's obligation to pay the Contractor for satisfactory deliverables in accordance with the contract awarded as a result of this solicitation. Award Fee is available for services and products identified in the Quality Assurance Surveillance Plan, noted in the Statement of Work.
3. The Contracting Officer (CO) and the PO shall determine whether a product/service is delivered on time and within budget. If it is deemed to be on time and within budget, it will be evaluated for quality by an Award Fee Evaluation Group (Group). The Group will consist of the NCS PO and CO, and possibly other Government officials or non-Government personnel (depending on specific expertise specified by the PO and approved by the CO). Each member of the Group will evaluate the quality of the deliverable using a numerical rating scale from 0 to 100. The scale will be defined as follows:

ADJECTIVE OF RATING	DEFINITION OF RATING	NUMERIC RATING	AWARD FEE AMOUNT
Superior	Contractor's performance exceeds standards by a substantial margin, and the monitor can cite few, if any, areas for improvement – all of which are minor.	95.0 - 100	Award amount based on points earned. Superior Performance earns 100% of Available Award Fee
Excellent	The Contractor's performance exceeds standard, and although there may be several areas for improvement, these are more than offset by better performance in other areas.	90.0 – 94.9	Award amount based on points earned. Excellent Performance earns 85% of Available Award Fee
Good	The Contractor's performance is standard and areas for improvement are approximately offset by better performance in other areas.	85.0 – 89.9	Award amount based on points earned. Good Performance earns 50% of Available Award Fee
Satisfactory/ Unacceptable	The Contractor's performance is less than standard by a substantial margin, and the monitor can cite many areas for improvement, which are not offset by better performance in other areas.	Below 84.9	Satisfactory/ Unacceptable Performance earns no (\$0) Award Fee.

4. Each member of the Group will give the product a numerical rating and those ratings will be averaged. An Average of 84.9 or less, (Satisfactory/Unacceptable) will result in no Award Fee for that six month rating period. An averaged score between 85 to 89.9 (Good) will result in 50% of Available Award Fee. An average of 89.9 to 94.9 (Excellent) will result in an award of 85% of the Available Award Fee, and an average of 95.0 to 100 (Superior) will result in award of 100% of the Available Award Fee. The Contractor and the Government agree that the award determinations are not subject to the Disputes Clause.
5. The overall purpose of this performance-based contract is to provide a strong incentive and maximum flexibility for the Contractor to achieve superior performance, allowing the Contractor flexibility in performing the work, and encouraging cooperation with the Government. All evaluations will be performed with this purpose in mind. Criticism should be constructive in all points and should be directed toward improvement of technical, management, and administrative conformance with Government objectives and requirements.

6. On the part of the Government, it is anticipated that the operations of the Group will be to establish and maintain a working relationship with the Contractor that will be conducive to a good business environment and stimulate the free exchange of relevant information. The Group's operation will provide for the establishment of priorities and relative importance of the elements of the work performed.
7. The Group will include with their numerical evaluation, corresponding narrative, which supports their scores. In developing remarks, the primary frame of reference will be the trend in level of performance throughout the evaluation period. Specific examples of performance may be used for clarification and emphasis. Remarks will explain reasons for an increase or decrease in the rating as well as justification for the ratings.

b) Responsibilities of the Award Fee Evaluation Group

The Award Fee Evaluation Group will evaluate the Contractor's technical achievements on a semi-annual basis using the various sources of performance information available.

c) Award Mechanism

The award fee will be made semi-annually. The CO will inform the Contractor of the amount of the semi-annual award along with the narrative explanation of the basis for the award. The payment of the Award Fee will be made after a written administrative change order is prepared and signed by the CO and an invoice is received from the Contractor for such award fee.

G. EVALUATION FACTORS

1. GENERAL

All aspects of the proposals are subject to discussions, including technical approach, cost/fee and contractual terms and conditions. However, the Government reserves the right to make an award without discussions. Therefore, it is important that your proposal be submitted initially on the most favorable terms from both the technical and price standpoint. Proposals submitted in response to this RFTOP will be evaluated in accordance with the evaluation criteria stated below:

- | | |
|--|--------------------|
| a) TECHNICAL APPROACH | (40 points) |
| b) PERSONNEL QUALIFICATIONS/MANAGEMENT PLAN | (40 points) |
| c) CORPORATE EXPERTISE | (15 points) |

d) FACILITIES AND RESOURCES

(5 points)

TOTAL

100 points

2. PAST PERFORMANCE

An evaluation of Offeror's past performance information will be conducted subsequent to the technical evaluation. However, this evaluation will not be conducted on any Offeror whose proposal would not be considered further based on the results of the evaluation of factors other than past performance.

The evaluation will be based on information obtained from references provided by the Offeror, other relevant past performance information obtained from other sources known to the Government, and any information supplied by the Offeror concerning problems encountered on the identified contracts and corrective action taken.

The Government will assess the relative risks associated with each Offeror. Performance risks are those associated with an Offeror's likelihood of success in performing the acquisition requirements as indicated by that Offeror's record of past performance.

The assessment of performance risk is not intended to be the product of a mechanical or mathematical analysis of an Offeror's performance on a list of contracts but rather the product of subjective judgment by the Government after it considers all available and relevant information. When assessing performance risks, the Government will focus on the past performance of the Offeror as it relates to all acquisition requirements, such as the Offeror's record of performing according to specifications, including standards of good workmanship; the Offeror's record of controlling and forecasting costs; the Offeror's adherence to contract schedules, including the administrative aspects of performance; the Offeror's reputation for reasonable and cooperative behavior and commitment to customer satisfaction; and generally, the Offeror's business-like concern for the interest of the customer.

The Government will consider the currency and relevance of the information, source of the information, context of the data, and general trends in the Offeror's performance.

The lack of a relevant performance record may result in an unknown performance risk assessment, which will neither be used to the advantage nor disadvantage of the Offeror.

The following rating method shall be used in the evaluation of past performance information:

+2 Excellent - Based on the Offeror's performance record, no doubt exists that the Offeror will successfully perform the required effort. Sources of information are consistently firm in stating that the Offeror's performance was superior and that they would unhesitatingly do business with the Offeror again.

+1 Good - Based on the Offeror's performance record, little doubt exists that the Offeror will successfully perform the required effort. Sources of information state that the Offeror's performance was good, better than average, etc., and that they would do business with the Offeror again.

0 None - No past performance history identifiable.

-1 Marginal - Based on the Offeror's performance record, some doubt exists that the Offeror will successfully perform the required effort. Sources of information make unfavorable reports about the Offeror's performance and express concern about doing business with the Offeror again.

-2 Poor - Based on the Offeror's performance record, serious doubt exists that the Offeror will successfully perform the required effort. Sources of information consistently stated that the Offeror's performance was entirely unsatisfactory and that they would not do business with the Offeror again.

3. AWARD

Offerors are advised that technical merit, staffing and past performance, are considered to be more important than cost.

Award will be made to the Offeror whose proposal offers the best overall value to the Government with technical merit and past performance weighed more heavily than cost.

Task Order# NICS-85

TITLE: National Children's Study -- Logistical Support

PART II - CONTRACTOR'S REPLY:

CONTRACT #263-01-D-0_____

Contractor:

Points of Contact:

Phone-

Fax-

Address:

TOTAL ESTIMATED COST: \$

Pricing Method CPAF

TOTAL ESTIMATED NUMBER OF HOURS:

PROPOSED COMPLETION DATE:

FOR THE CONTRACTOR:_____

Signature

Date

SOURCE SELECTION:

WE HAVE REVIEWED ALL SUBMITTED PROPOSALS HAVE DETERMINED THIS FIRM
SUBMITTED THE BEST OVERALL PROPOSAL AND THE PRICE/COST IS REASONABLE.

Billing Reference # _____

Appropriations Data: _____

RECOMMENDED:

FAX #

Signature - Project Officer

Date

APPROVED:_____

FAX #

Signature - Contracting Officer

Date

NIH APPROVAL -

CONTRACTOR SHALL NOT EXCEED THE ESTIMATED LABOR HOURS OR ESTIMATED TASK ORDER
AMOUNT WITHOUT THE WRITTEN APPROVAL OF THE CONTRACTING OFFICER & PICS
COORDINATOR

APPROVED:_____

Signature -Anthony M. Revenis, J.D., NIH-PICS Coordinator

Date